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FRANCE'S FISHING INDUSTRY, 1964 1/

SUMMARY

EVOLUTION OF THE FRENCH FISHERIES INDUSTRIES IN 1964 :

The production of the French Fisheries industry, which remained very stable during the past years, has reached during 1964 an importance that has surprised all professionals of the fisheries industry. For the first time, a decrease in price has been noted, even though producers' costs continue to increase.

The total production of the French fishing industry for 1964, was 646,700 tons, consisting of 487,800 tons of fish, 140,000 tons of shell-fish and 18,900 tons of crustaceans, and was valued at approximately 1.1 billion francs.

It should be noted that the volume of frozen fish and crustaceans is 21,000 tons. Even though this does not reflect considerable progress, the amount of fish and crustaceans frozen two years ago, was half of the above figure.

France's consumption of fish increased in 1964. This is attributed to increased French production, rather than to imports as was the case during the preceding years.

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Production increased nearly 8% though corresponding unit prices decreased by 4%. The increase in production is the result of greater interest by the fishing fleet to catch certain species which were so far not presented for sale on the French market ; this also contributed to the price decrease. This is due to new and more powerful ships which were put in service in 1964, and which operate in deep waters at greater distances ; while previously, ships fished in nearer waters where fish resources have partly been exhausted.

GEOGRAPHICAL AREAS :

France's largest production is concentrated in 13 various seaports which landed 419,000 tons. These consisted of 409,000 tons of fresh fish, 7,600 tons of crustaceans (mostly Norwegian lobster (Langoustines)) and 2,400 tons of shell fish (mostly scallops).

This indicates that the concentration of production in the most important seaports still continues. The seaport of Boulogne has the leading production, with 139,003 tons, then Lorient with 58,032 tons and Concarneau with 57,962 tons.

The Franco-British agreement concerning France's rights of fishing within 12 miles of the reserved zones surrounding the English coasts was signed in mid-December.

Comments made by the President of the Federation of French ship owners reveal that this agreement will have unsatisfactory consequences for France, especially the herring fishing. The largest part of the Eastern coast of England has been excluded to France, where the "Whitby" herring is caught. Since the herring is caught only in the North Sea, next year's production of herring by French fisheries might prove to be insufficient. Outside of the herring called "Small", which production is little, and as the largest mass of herring is located at Whitby, France's catches of herring will be limited.

The so-called "France-Brazil lobster war" which existed in 1963 appears to have reached a term of conclusion and agreement. Private contacts have been made between French and Brazilian lobster fisherman and boat owners. At a meeting in Brittany, a new contract has been proposed which would apply only to the State of Bahia (Brazil) permitting ships to land in the port of Salvador (Brazil). One of the clauses includes the delivery to Brazil of a certain quantity of fish. Ship owners have agreed to 5 tons of fish (not lobster) per trip. Furthermore, the contract includes delivery to Brazil of 15% of the lobster catch, per boat.

These clauses appeared acceptable and boat owners were willing to sign the contract. The latter, however, remained to be approved by the Government of Brazil and as of December 1964, it had not been signed.

French fishing boats have had their first experiences to fish "Brown lobster" in Honduras (Central America). A fleet of 4 boats left between July and November of 1964. During January 1965, the first boat returned after a fishing campaign of 4 months plus a return trip of 28 days. Lobster was placed in fish wells of 30o centigrade water and landed in Brittany where water temperature was 9o centigrade. This sudden temperature change was not serious. The loss registered during the return trip was minor, which proves that live lobster can be brought in from American coasts.

Total freezing of lobster is not possible since brown lobster is small and weighs an average of 800 grams. Parts which can be frozen represent barely one third of the total weight.

Lobster in the Honduras waters migrate. During the first months, the number of lobster caught amounted to an average of 800, which later decreased to 600 and 500. Therefore, before French fishing boats will undertake further lobster campaigns in the Honduras, migration time of looster will have to be considered. The catch of one boat amounted to 20 tons of lobster, of which 7.5 tons of lobster tails were deep frozen on the vessel.

PRODUCTION

An overall picture of the recent production of the French fishing industry will be found in the following comparative table :

	Quantity Thousands of Metric Tons			Value Millions of Francs		
	1962	1963	1964	1962	1963	1964
Fish (coastal) fresh	373.9	382.3	418.1	604.5	615.7	643.1
frozen	10.3	14.9	17.5	14.5	25.2	30.1
Codfish (deep sea)						
salted	61.0	44.6	51.3	70.1	57.9	68.9
frozen	0.5	0.9	0.9	0.9	1.6	1.5
TOTAL FISH	445.7	442.7	487.8	690.0	700.4	743.6
Crustaceans - fresh	18.5	17.0	18.8	79.7	80.1	95.5
- frozen	0.5	0.2	0.1	6.2	4.0	1.0
TOTAL CRUSTACEANS ..	19.0	17.2	18.9	85.9	84.1	96.5
Shell-fish						
- from open ground	27.7	25.9	26.0	27.6	26.5	26.0
- from breeding beds	108.0	110.0	114.0	184.0	205.7	233.0
TOTAL SHELL FISH ...	135.7	135.9	140.0	211.6	232.2	259.0
GRAND TOTAL	600.4	595.8	646.7	987.5	1,016.7	1,099.1
Fish oil (codfish) ..	1.9	1.2	3.3	1.1	1.2	4.0
Fish meal	14.0	8.0	12.0	n.a.	n.a.	n.a.
Canned fish (tonnage canned)	90.1	89.5	92.7	n.a.	n.a.	145.0

I - FISH (COASTAL FISHING) :

The catch of fish by the French coastal fishing fleet in 1964 reached 435,500 tons, of which 17,490 tons of fish were frozen on boats. This total catch was valued at 673 millions of francs. These figures include catches by coastal fishing fleets operating in European waters as well as fleets specialized in tuna and sardines operating in African waters.

Landed tonnage of fresh fish, only, amounted in 1964 to 407,430 tons compared to 371,470 tons in 1963. This reflects an increase of 9.7% over the preceding year. These quantities have a value of 626.8 millions of francs in 1964 whereas the value of the preceding year was 599.6 millions of francs. This reflects an increase of 4.5%.

As a result, the average price per kilo of fresh fish was 1.537 francs against 1.614 francs for the preceding year, consequently showing a decrease in the fish price of at least 5%.

Therefore, two important points should be brought out concerning the 1964 fresh fish industry : first, a high level of production, and second, the decrease of the average fish price.

The increase in production for 1964 is due to larger catches in the North Sea and the English channel, (increase of 15%), South Atlantic (increase of 14%), and Southern Brittany (increase of 8%).

The Mediterranean production reached 22,167 tons in 1964, which is the highest registered for this region to date. Nevertheless, this increase of 1,100 tons (plus 5%) compared to 1963 appears to be small compared to the total production (plus 10%). It should be noted that favorable conditions existed for the sardine industry last year and poor production of the Atlantic fisheries, in 1964.

The value of the Mediterranean production reached 53,5 millions of francs in 1964, compared to 50,4 millions of francs in 1963, an increase of 6.1%.

The following table will give a picture of the Mediterranean production:

	1960	1961	1962	1963	1964
Quantities in metric tons .	11,005	16,367	15,465	21,056	22,167
Value in millions of francs	31.93	42.52	38.06	50.43	53.55
Average price in francs per kilo	2.82	2.60	2.46	2.39	2.41

The following table gives a comparative breakdown of the French production of fresh fish over the past three years (in metric tons) :

	1962	1963	1964	Difference 1964/63
SEASONAL SPECIES :				
Herring (salted	356	318	-	- 318
(fresh	29,453	33,116	35,125	+2,009
Mackerel	35,634	37,769	39,296	+1,527
Sardine	31,739	26,129	23,386	-2,743
Tuna (landed in France	19,349	15,273	18,486	+3,213
(landed in Africa	10,300	10,797	10,660	- 137
Sprat and Anchovies ...	1,266	1,471	3,091	+1,620
Other	-	-	798	+ 798
TOTAL SEASONAL SPECIES	128,097	124,873	130,842	+3,480
OTHER SPECIES :				
Hake or pollock	33,592	29,101	28,079	-1,022
Whiting	32,493	37,700	34,387	-3,313
Sole	1,817	2,083	1,609	- 474
Miscellaneous	177.891	188.710	223,178	+34.468
TOTAL OTHER SPECIES ...	245,793	257,394	287,253	+29,659
GRAND TOTAL FRESH FISH	373,890	382,267	418,095	+33,139

The general average price of fish decreased from Fcs. 1.61 per kilogram in 1963 to Fcs. 1.54 in 1964. Average prices for the various species are as follows :

	Francs (per Kg.) 1963	1964	Percentage of Change - 1963/64
Herring	0.80	0.63	- 21 %
Mackerel	1.09	0.94	- 13.6 %
Sardine	1.52	1.66	+ 9.2 %
Tuna White	3.06	3.10	+ 1.4%
Tuna Red	4.49	4.37	- 2.6%
Whiting	0.98	0.98	--
Hake or Pollock	3.76	4.04	+ 7.4%
Sole	6.37	8.41	+ 32 %
Other Species	1.72	1.62	- 5.8%

II - CODFISH (DEEP SEA FISHING) :

The catch of codfish, in 1964, was superior to the preceding year. The codfish fleet which consisted of 27 boats, of which one boat processes salting and freezing, caught 51,282 tons of codfish, of which 39,109 tons were landed in France and 2,174 tons exported directly to Portugal. In addition, 3,321 tons of codfish oil and 868 tons of frozen codfish filets were landed, which increased the total deep sea fishing production to 55,470 tons, representing a value of 74.4 millions of francs. In comparison with 1963, during which the total production was 44,642 tons, an important increase of approximately 24% can be noted. Accordingly, the value of production which in 1963 was of Fcs. 57.9 millions increased by 29%.

There is a small difference in the production of frozen codfish in 1964 (868 tons) compared to 863 tons in 1963, an increase of only 0.57%. The total value of frozen cod fish amounted to 1.52 millions of Francs.

The average price of salted and frozen codfish was 1.34 and 1.75 francs per kilogram, respectively.

III - CRUSTACEANS :

The total crustaceans production in 1964 amounted to 18,900 tons, compared to 18,040 tons in 1963 and over 20,000 tons per year from 1960 to 1962.

This increase in production, which is mostly concentrated in the Western and Southern ports of Brittany, and which nevertheless represents 100 million francs, is not sufficient to warrant hopes for future production. It is known that France has been in a difficult situation, for several years, because of the decrease in the catch and will, in the future, face a new crisis when the new off-shore limits will be applied where France has its traditional activities.

The hope to increase the production of the frozen lobster market has vanished since this production amounted to only 100 tons in 1964 compared to 839 tons in 1961.

The following table shows the evolution of crustaceans production as well as the average prices over the past three years :

	Quantity (metric tons)			Average price per Kg. (francs)		
	1962	1963	1964	1962	1963	1964
Spiny lobster red	699	493	443	18.50	21.20	22.54
green	190.5	117	75	15.20	15.84	16.07
pink	1,174	1,144	925	12.20	13.95	17.86
TOTAL SPINY LOBSTER	2,063.5	1,759	1,443	14.62	16.10	19.24
Lobster	405	292	414	15.50	16.40	17.40
TOTAL SPINY LOBSTER AND LOBSTER	2,468.5	2,051	1,857	14.75	16.16	18.77
Norway lobster (langoustines)	6,665	8,377	9,185	3.40	3.36	3.89
Grey shrimp	1,326	1,533	2,201	3.92	3.96	4.80
Pink shrimp	361	223	220	13.40	18.63	16.00
Crab	5,560	3,551	4,317	1.22	1.52	2.12
Misc. crustaceans	2,143	1,219	998	1.83	n.a.	n.a.
TOTAL CURSTACEANS	18,523.5	16,954	18,778	4.30	4.72	5.08
Frozen shrimp	7	10	-	7.30	N.A.	-
Frozen spiny lobster ...	497	244	101	12.30	16.27	18.53
GRAND TOTAL	19,027.5	17,208	18,879	4.50	4.88	5.15

IV - SHELL-FISH :

The total production of shell-fish caught in open waters and shell-fish obtained from breeding-beds amounted to 178,397 tons valued at 298,967,000 francs in 1964, compared with 135,698 tons valued at 211,603,000 francs in 1963.

The following table shows production for shell-fish from open grounds and breeding beds as well as values for 1964.

	Quantities in metric tons	Value in thousands of francs
	1964	1964
a) Shell-fish from open grounds :		
Scallops	7,821	12,838
Mussels	45,000	40,050
Miscellaneous shell-fish (except oysters)	12,076	13,079
TOTAL	64,897	65,967
b) Shell-fish obtained from breeding-beds :		
Oysters flat	10,000	59,500
Oysters "Portuguese"	59,000	135,700
TOTAL	69,000	195,200
Mussels	45,000	37,800
TOTAL	114,000	233,000

The above statistics have been obtained from the Interprofessional Committee for culture of shell-fish. They show a slow, but continuous progress.

V - FISH OIL :

Production of codfish oil increased in 1964, and amounted to 3,321 tons compared to 1,183 tons in 1963. The value amounted to Fcs. 3,970,000 and the average price per kilogram to Fcs. 1.19

VI - FISH MEAL :

Production of fish meal is estimated to 12,000 tons of which 268 tons were codfish meal. Half of this production originates from the Port of Boulogne and the other half from various small ports in Brittany. Value of this production is not available.

VII - CANNED FISH, CRUSTACEANS AND SHELL-FISH :

The following table gives a breakdown by species of the various fish products which were canned in France in 1963 and 1964 :

	Number of cans		Quantity of fish (metric tons)	
	1963	1964	1963	1964
Sardines	95,250,000	105,000,000	20,000	22,000
Tuna	108,700,000	116,500,000	26,500	28,200
Mackerel	95,800,000	104,000,000	23,000	25,000
Herring	21,700,000	13,000,000	5,000	3,000
Sprats and Anchovies	5,880,000	5,880,000	1,000	1,000
Other fish	40,000,000	40,000,000	12,000	12,000
Crustaceans and shell-fish	6,670,000	5,000,000	2,000	1,500
TOTAL	374,000,000	389,380,000	89,500	92,700

FOREIGN TRADE

Foreign trade statistics show that imports and exports of fish, crustaceans, shell fish, fish oil and canned fish decreased in 1964. The only increase existant in imports and exports concerns fish-meal.

I - IMPORTS :

a) Fish, Crustaceans and Shell-fish : French imports of these products totalled 131,615 tons evaluated to Fcs.272,331,000 in 1964 compared to 144,918 tons worth 287,857,000 Fcs. in 1963.

US imports increased in 1964 and reached a total of 1177 tons worth 7,654,000 francs compared to 788 tons worth 4,979,000 francs in 1963. These consisted of 1019 tons of salmon compared with 611 tons in 1963 : 105 tons of "other molluscs and shell-fish" compared with 155 tons in 1963 ; 34 tons of frozen fish filets (no imports in 1963) and 19 tons of crab and crayfish compared to 22 tons in 1963.

France's major supplier of salmon was Canada (2,117 tons) : of "other molluscs and shell-fish, Ireland (1,994 tons), of crab and crayfish, Turkey (233 tons) and Italy (72 tons).

b) Fish oil : Imports of fish oil decreased very slightly in 1964. Total imports amounted to 29,289 tons valued at Francs 20,746,000 compared to 29,990 tons valued at 26,649,000 Francs in 1963. There was no U.S. participation in imports of fish oil.

c) Fish meal : Imports of fish meal increased from 76,512 tons worth 50,379,000 Fcs. in 1963 to 104,835 tons worth 72,155,000 Fcs. in 1964. There was no US participation in this field.

d) Canned and prepared fish, crustaceans and shell-fish : There has been a decrease of the above items imported into France during 1964. Imports totalled 20,094 tons valued at Fcs. 107,834,000 in 1964 compared to 44,657 tons valued at Fcs. 200,340,000 tons in 1963.

US participation increased from 142 tons worth 1,356,000 Fcs. in 1963 to 309 tons worth Fcs. 2,454,000 in 1964.

II - EXPORTS :

French exports of fish, crustaceans and shell-fish decreased from 27,154 tons worth 59,440,000 francs in 1963 to 20,154 tons worth 42,467,000 francs in 1964. Of these items, exports to the United States increased from 1,330 tons worth 2,625,000 francs in 1963 to 2,623 tons worth 5,310,000 francs in 1964. Fish exported was only salted codfish and salted codfish filets.

French exports of fish-oil decreased from 3,926 tons worth 5,117,000 francs in 1963 to 3,005 tons worth 3,214,000 francs in 1964. There were no exports of this item to the United States. Fish meal exports increased from 1,834 tons worth 1,042,000 francs in 1963 to 2,489 tons worth 1,691,000 francs in 1964. There were no exports of fish meal to the United States.

Exports of canned and prepared fish, crustaceans and shell-fish decreased from 2,740 tons worth 16,754,000 francs in 1963, to 1,158 tons worth 9,555,000 francs in 1964. Of these exports, 149 tons worth 1,287,000 francs were sent to the United States, in 1964, compared to 177 tons worth 1,399,000 francs in 1963 ; a decrease in exports to the United States.